SOM Work Instructions Template

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| --- | --- | --- | --- | --- | --- | --- | --- |
| A picture containing text, gauge  Description automatically generated | | | **[Department/CRAU Name]**  **Work Instruction (WI)** | | | | |
| **Title** |  | | | | | **WI Number** |  |
| **Issue Date** | |  | | **Effective Date** |  | | |

SCOPE

Brief statement that specifies the area or process and to whom the work instructions apply. If the work instructions support a Standard Operating Procedure (SOP), please indicate the name of the SOP.

Prerequisites

Describe any information, equipment, or supports required prior to initiating the work instructions (e.g., review of SOP, delegation of authority log, other documents, access to software, setup tools/equipment, etc.).

WORK INSTRUCTIONS

List the steps to be taken to complete the scope of this work instruction. A work instruction contains more detail than a standard operating procedure (SOP) and may be in the form of text, flowcharts, images, or any combination of these, provided that the work instructions are easy to follow and achievable by the team members defined in the scope.

Team members defined in the scope should also be consulted during the work instruction creation and approval. Define responsibilities when applicable.

Work instructions should not contradict any departmental or Clinical Research Support Office SOPs.

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| --- | --- | --- |
| **Step #** | **Work Instructions** | |
| 1. | [Describe this step using an active verb] | |
| 2. | [Describe this step using an active verb] | |
| 3. | [Describe this step using an active verb] | |
| 4. | [Use ‘if-then’ table to describe steps where specific circumstances determine the next step] | |
|  | **If** | **Then** |
|  | [User does this] | [Follow this step] |
|  | [User does this] | [Go to Step #] |
|  | [User does this] | [Go to Step #] |
| 6. | [Describe this step using an active verb] | |
| 7. | [Describe this step using an active verb] | |

DEFINITIONS

List of terms or acronyms that are used or referred to in the work instruction.

REFERENCES

Any external documents or files that are referred to in the work instruction.

APPENDICIES

Templates or documents that support or enhance the content of the work instruction.

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| **Revision History** | | |
| **Version** | **Effective Date** | **Change Summary** |
| #.# | Date WI is in effect | Brief summary of changes (if initial version, state “first approved version”) |
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